



**SAN FRANCISCO
HEALTH SERVICE SYSTEM**

Affordable, Quality Benefits & Well-Being

ADDENDUM NO. 1

**RFP for As-needed Off-site Employee Benefits Call Center Services
(RFPQHSS2023.01)**

June 6, 2023

REQUEST FOR PROPOSALS FOR

**As-needed Off-site Employee Benefits Call Center Services for the
San Francisco Health Service System**

RFPQHSS2023.01

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This Addendum is being issued to modify the requirements in the above-referenced Request for Proposals (RFP). One or more additional addenda will be issued by or before June 13, 2023 in response to questions received by or before the (updated) Deadline for RFP Questions, Thursday, June 8, 2023 at 12:00 PM (Pacific Time).

Please review the terms of the RFP and this Addendum carefully. If there are any inconsistencies between the RFP and the terms of this Addendum, then the terms of this Addendum will prevail.

Section references below are to the RFP and are provided for reference.

A. Questions & Answers

- 1. Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories such as pricing for in-center production hours, per connected call or per connected minute?**

SFHSS Response:

SFHSS is amendable to preferred pricing structures from Respondents based on their expertise, experience and understanding of the current SFHSS Member Services (MBS) call center staffing level and call volume.

However, in order to allow our evaluation panel to fully assess the different pricing structures that may be provided, Respondents are required to complete (the new/added) RFP Appendix B – Vendor Pricing Quote Template. The rates quoted in Appendix B must be fixed and inclusive of all fees for services during the entire term of the contract.

For Appendix B, please list all assumptions that factor into the quoted cost and insert additional rows as necessary. It is the responsibility of the Respondent to ensure spreadsheet calculations are accurate to the greatest extent possible.

- 2. Is the City willing to consider the use of near-shore or off-shore resources in order to get the best overall value for the City's investment on this project?**

SFHSS Response:

No. As the services to be performed by a selected Respondent will involve the use of information that is protected under the Health Insurance Portability and Accountability Act (HIPAA) and in accordance with the rules and guidance of the City Department of Technology and City Attorney, the City and SFHSS require the selected Respondent providing these services to access City data solely from within the continental United States and with the use of computing and data storage devices located within the continental United States.

3. **Can the work outlined in this RFP be performed by onshore agents in a secure at-home (remote) work environment? Are there any other specific security or compliance requirements that we need to be aware of?**

SFHSS Response:

Yes. SFHSS is open to vendor proposals that include secure and remote working arrangements for their agents within the continental United States. Vendors (RFP Respondents) must demonstrate the environment and/or location in which work is being performed is secure and includes high-speed broadband internet connectivity to ensure optimal call quality, the prevention of dropped calls, and the capability to quickly and consistently access and query data from SFHSS's systems.

Because these services entail interaction with sensitive and protected information, any and all computer equipment utilized to provide services, including those used to access City data, must be company owned. At no time can an operator's personal equipment be used.

The selected Respondent will be required to provide a copy of their policies and procedures for the City's review and approval, including policies related to telecommuting, data security, authorization of personnel, and others of a technical nature.

4. **Can you describe how the vendor's call center services would integrate and/or interact with the City's existing systems and processes? For example, are callers required or allowed to connect with a message verification system or pre-recorded message before connecting to a live operator at an external call center, or must a live operator be the initial contact?**

SFHSS Response:

Based upon a caller's progression and selection(s) through the department's interactive voice response (IVR), the caller may be directed to the selected Vendor's call center in accordance with the scope of work under the agreement resulting from this RFP. Similarly, if the caller selects an option that is out-of-scope, that call would not be routed to the vendor and would be handled internally by SFHSS staff.

In the event a caller is routed to the selected Vendor's call center, the City then requires a live operator to be the initial contact for all calls. There should be no

indication to the caller that the caller is speaking with a vendor agent/call center employee/staff-member/contractor, and not an SFHSS Member Services Division employee.

Additionally, the City anticipates the selected Vendor will only be receiving inbound calls from its Members. Outbound calls will be strictly limited to situations where a caller, who is actively receiving in-scope services from a vendor, seeks additional support that falls out-of-scope. For example, should a Member receive in-scope services for the initial question, then asks a secondary question that is considered out-of-scope, the vendor's agent would provide a warm transfer back to the SFHSS Member Service Division internal call center in San Francisco.

5. What information does SFHSS require to be included in call logs?

SFHSS Response:

At minimum, the following fields are required to be captured in all call logs and provided to SFHSS:

- Date and time of Call
- Caller phone number
- Call ID
- Call duration
- Reason for call
- Caller's primary language
- Caller's primary language other than English (if applicable)
- Interpreter service(s) requested (if applicable)
- Interpreter service(s) used (if applicable)
- Duration placed on-hold
- Agent Name accepting call
- Average Speed of Answer (ASA)
- Wrap-Up time
- Call outcome and Next Steps

Other information fields may be required as determined by the department and based on further discussions with the selected Respondent and their capabilities. SFHSS is also open to recommendations from vendors on additional fields for consideration.

SFHSS will coordinate with the selected Vendor to define all possible options for each of the above log entries, including, as appropriate, a miscellaneous or unknown/not-provided option, so as to streamline the call log process.

6. **Please provide additional information pertaining to the recording requirements for inbound and outbound phone calls, including those for non-phone communications. Please also clarify how long recordings must be maintained.**

SFHSS Response:

The City's minimum requirements for recording and preserving all calls are described in RFP Section 2.3.3 (Data Tracking, Reporting and Call-Recording), including calls that require access to City systems.

In addition, designated City staff should be able to log into the vendor's call system and access recordings that are available for 180 days from the date of the call.

If access to the vendor's system is not possible, files of all call recordings and interactions between the selected Vendor's staff and Members, SFHSS third-party vendors, or SFHSS staff must be provided to SFHSS on a weekly basis via a secure transmission. These files must be indexed and searchable by the following at minimum:

- Call Date and Time
- Agent
- Inbound Phone Number

Please also reference the answer to Question 5, above.

7. **How do you typically handle feedback and performance evaluations for your service providers? Please describe how SFHSS anticipates approaching Quality Assurance (QA) with the selected Contractor, including the participation of SFHSS and vendor personnel. Please provide clarification on the method and frequency that SFHSS would prefer to access any QA-related data and reports.**

SFHSS Response:

SFHSS expects the selected Respondent to provide a weekly report on call performance report based on the metrics requested in the RFP. In addition, SFHSS expects to perform a monthly analysis of a sample of recorded calls to ensure the Vendor's staff are adequately trained.

Open Enrollment is a critical period for SFHSS and its Members when call volumes tend to peak. SFHSS will evaluate the selected Respondent's performance in January 2024 after the 2023 Open Enrollment period (October to December), including reviewing (a) their ability to achieve agreed-upon milestones and (b) any and all feedback provided by SFHSS staff and its Members. The evaluation will inform the areas that SFHSS and the Respondent will target for additional training in preparation for the 2025 Open Enrollment, beginning In July 2024.

Please reference the answer to Question 6 above regarding SFHSS's expectations regarding the means and frequency of accessing the selected Respondent's call data and files related to SFHSS Members in support of QA processes. In addition, per RFP Section 2.3.3 (Data Tracking, Reporting and Call-Recording), the selected Respondent will provide the requested performance metrics on a weekly basis, either via direct access or submitted to SFHSS via email on a weekly basis.

Please also reference the answer to Question 11 below for additional information regarding SFHSS's expectations for meeting frequency with the selected Respondent.

- 8. Please specify any customer information systems, phone systems, or software the selected Respondent is required to have previous experience with and include in the solution.**

SFHSS Response:

The selected Respondent must have experience with utilizing the following software and applications:

- Cisco Webex
- Salesforce
- PeopleSoft Human Capital Management (HCM) 9.2
- Microsoft Office Suite, primarily Word and Excel

- 9. What is the current average after-call work (ACW) time for operators?**

SFHSS Response:

Through May 2023, the average after-call work time is between 3 to 5 minutes.

10. What is the current level of staffing for Member Services Division, including the number of benefits analysts and supervisors?

SFHSS Response:

As stated in RFP Sec. 1.2 (MBS Operations and Staff), the Member Services (MBS) division is comprised of twenty-three (23) full-time positions, of which five were assigned to answer phone calls in April 2023 (RFP Section 2.1, Summary of Current MBS Call Operations and Backlog and Reallocation of Resources). The selected Respondent would also work closely with the Operations Manager and Benefits Supervisor to ensure their personnel are trained and provided support.

11. Does SFHSS require a minimum and/or maximum level of staffing (i.e., operators and supervisors) by the selected Respondent in providing services under this agreement.

SFHSS Response:

The selected Respondent is expected to provide the City with at least the following staff contacts to fulfill the associated roles and responsibilities:

- one (1) staff for project management; and
- one (1) call center supervisor serving as the primary contact for Member escalations.

The number of staff required to handle phone calls will vary during the year (RFP Sec. 1.2.2, MBS Call Center Volume), and the selected Respondent will work closely with the SFHSS Member Services Division to discuss optimal staffing configurations. Moreover, the selected Respondent will be expected to meet with SFHSS on a weekly basis during implementation and peak call volume periods and on a monthly basis, at minimum, during non-peak periods, as determined by SFHSS (RFP Sec. 2.3, Scope of Services).

12. How do you measure customer satisfaction and gather feedback from your members? For example, what are key performance indicators (KPI) related to customer service and member satisfaction?

SFHSS Response:

SFHSS is currently in the process of developing a Member satisfaction survey, in addition to exploring the use of an after-call survey to gather caller feedback through a Webex platform.

- 13. Please indicate the share of calls received over the past year by language. For example, what percentage of calls were in English versus other languages, including those cited in RFP Section 1.1.3, SFHSS Member Population?**

SFHSS Response:

Over 95% of calls are from callers (Members) who speak English as their first language or English as a second language (ESL), with the remaining callers obtaining their own translators (usually an immediate family Member) who is present on the call. As such, SFHSS is not currently tracking calls based on the caller's language preference. However, SFHSS is in the process of implementing the use of LanguageLine® for interpretation services. To expand our language capabilities and accessibility for Members, as result of this RFP, SFHSS is ideally seeking a vendor with the resources and capability to handle and track the number of both English and non-English speaking calls.

- 14. What are the required language options?**

SFHSS Response:

In addition to English, the City's Language Access Ordinance requires City departments to provide language access services in the following three (3) languages: Chinese (Cantonese and Mandarin), Spanish, and Filipino.¹ Moreover, per RFP Section 1.1.3 (SFHSS Member Population), SFHSS Members are diverse in their language needs, with the need for interpretation of a variety of languages including, but are not limited to, Spanish, Japanese, Mandarin, Cantonese, Tagalog, Hindi, and Russian.

SFHSS values Proposals that demonstrate a Respondent's capacity to provide services in the widest array of languages beyond English.

¹ <https://sf.gov/languageaccess>

15. Please specify any service requirements related to the following:
- Percentage of calls that must be resolved without a transfer, second call, or a return call;
 - Percentage of inbound calls that must be answered by a live operator;
 - Maximum hold time per call;
 - Minimum simultaneous inbound call capacity; and
 - Minimum required total call capacity

SFHSS Response:

SFHSS requires the selected Respondent to meet or exceed the following service thresholds:

Service Requirement	Threshold
a. Percentage of calls that must be resolved without a transfer, second call, or a return call	85%
b. Percentage of inbound calls that must be answered by a live operator	100%
c. Maximum hold time per call	10 minutes
d. Minimum simultaneous inbound call capacity	Variable based on the period of year that services are being requested.
e. Minimum required total call capacity	

16. Please describe how SFHSS anticipates approaching training with the selected Respondent. For example, will training of the vendor's staff be provided directly by SFHSS staff? Would training be provided by SFHSS to the vendor's designated personnel, then to the vendor's staff? Is this training expected to be provided virtually or on-site?

SFHSS Response:

Training can and will most likely be virtual (likely using Microsoft Team video and screen-sharing, Webex, or a comparable video conference platform).

While training can be provided directly to vendor's staff by SFHSS, SFHSS may also be able to provide training to vendor project managers and supervisors (train-the-trainer), *i.e.*, although the training on benefits/Member eligibility and City systems will be developed by SFHSS, vendor's project manager(s) and supervisory staff will participate in training and training development, as there may

be process/procedures that are specific to the vendor's operations that would need to be incorporated therein.

17. What is the current average wait time for phone calls?

SFHSS Response:

Per RFP Section 1.2.2 (MBS Call Center Volume) the Average Speed of Answer in 2022 (ASA) was 627 seconds (10 minutes, 27 seconds). From January through April 2023, the ASA was 519.8 seconds.

See RFP Section 1.2.2 (MBS Call Center Volume) for the ASA since 2019, including a breakdown by month.

18. What was your average monthly call volume over the past year?

SFHSS Response:

Per RFP Section 1.2.2 (MBS Call Center Volume), the average monthly call volume for 2022 was 3,969 calls. Based on the data available from the previous twelve (12) months, the monthly call volume from May 1, 2022 through April 30, 2022 averaged 3,660 calls.

19. How does SFHSS currently handle peak call volumes or unexpected surges in customer inquiries? What does SFHSS anticipate being the number of phone calls handled and/or minutes of service provided by the vendor on a weekly or monthly basis?

SFHSS Response:

Member Services (MBS) experiences the highest call volume during the following periods:

- June and July when the majority of City employees retire from public service;
- October during our annual health benefits open enrollment; and
- November and December when MBS processes health benefit changes from open enrollment (RFP Section 1.1.1., SFHSS and the SFHSS Member Services Division).

Consistent with these patterns, MBS data indicate that call abandonment rates also rise during these periods compared to the rest of year (see RFP Section 1.2.2,

MBS Call Center Volume). To handle these surges, MBS utilizes a voicemail service through which Members are able to leave a voicemail after being on hold for fifteen (15) minutes. These voicemails are then returned on Saturdays (mandatory overtime hours) by MBS staff (RFP Sec. 2.1, Summary of Current MBS Call Operations and Backlog and Reallocation of Resources).

Based on the types of calls received and that would be considered under the scope of the selected Respondent's responsibility, SFHSS anticipates between 30% to 50% of calls received by MBS may be directed to the vendor during peak periods. However, this would be subject to change on a monthly basis and be impacted by the variability within those peak periods.

20. What is the required degree of dedication for the call center and its operators? Can the Selected Respondent work on other contracts at the same time as this one?

SFHSS Response:

Because the selected Respondent would only provide services to SFHSS on a temporary and as-needed basis at SFHSS's request, there are no limitations or prohibitions on the selected Respondent entering into other agreements and/or providing services to other entities.

21. Please provide any available information that can be shared regarding the incumbent vendor and services being provided under an existing agreement.

SFHSS Response:

The services described in this RFP are currently being provided by SFHSS staff. There is no external vendor or agreement under which these services are being provided.

22. Please confirm the due date for this procurement.

SFHSS Response:

Per RFP Section 3.3 (Submission of Proposals) Respondents must submit all required documents in Adobe PDF format via email to Patrick Chang (patrick.chang@sfgov.org), cc: michael.visconti@sfgov.org, no later than Friday, June 23, 2023 at 12:00 PM (PDT) ("Deadline for Proposals").

To be eligible for evaluation, Proposals must adhere to the format outlined in RFP Sec. 3.5 (Proposal Structure). Each proposal shall contain only relevant information that is specific to this RFP and the specific questions and requests contained herein.

- 23. Please provide clarification whether it is mandatory to utilize Local Business Enterprises (LBEs) certified firm as a subcontractor to bid on this contract. If so, please specify the mandatory subcontracting goal for this contract.**

SFHSS Response:

While there is no subcontracting requirement for an agreement resulting from this RFP, SFHSS strongly encourages responses from vendors certified by the City as a Local Business Enterprise (LBE) – that is, those that are headquartered in San Francisco – by the Deadline for Proposals on Friday, 6/23/2023.

Per RFP Section 4.7.21, Local Business Enterprise, a ten percent (10%) rating bonus will be applied to Proposals from vendors certified as either a Micro-LBE or Small-LBE, and a two percent (2%) rating bonus may be applied to Proposals from vendors certified as an SBA-LBE. Any Respondent certified as an LBE must submit Form 2A with their proposal to be considered for the ratings bonus.

However, at the time of the release of the RFP, SFHSS and CMD were unable to identify any LBE firms certified in call center support services.

For more information, please see pages 10 and 11 at <http://sfgov.org/cmd/file/371>, and email michael.visconti@sfgov.org and cc: patrick.chang@sfgov.org.

- 24. Please provide clarification on how SFHSS will enforce the stated page limitations in reviewing a Respondent's Proposal.**

SFHSS Response:

Vendors must submit a Proposal that adheres to the organization and format described in RFP Section 3.3 (Submission of Proposals) and Section 3.5 (Proposal Structure), including the page limits outlined therein.² There are a total of nine (9)

² https://sfhss.org/sites/default/files/2023-06/As-Needed%20Call%20Center%20Support_RFPQHSS2023.O1.pdf

required sections in a Proposal and two (2) appendices. The following include a page limit:

- Section 1: Cover Letter (word / page limit: 500 words or one (1) page)
- Section 2: Table of Contents (word / page limit: 500 words or one (1) page)
- Section 3: Executive Summary (word / page limit: 1,000 words or two (2) pages). Note the IRS W-9 form does not count against this page limit.
- Section 4: Litigation (word / page limit: 500 words or one (1) page)
- Section 6: Approach / Strategy to Services (word / page limit: 2,500 words or five (5) pages)
- Vendor Response Form (Appendix A): Attachments must not exceed twenty (20) total pages.

If the page limit is exceeded for any of the sections above, SFHSS must remove any and all pages in excess of the stated limit prior to submitting them to the evaluation panel for review. This is in order to ensure fairness for all vendors that adhere to the limits.

- 25. Minimum Qualification 3.2.4. requires that a “Respondent has at least three (3) years of experience providing similar services to Public Sector Employers or large employers with more than 10,000 employees”. For companies without such clients in their portfolio, can this be substituted with the professional experience or expertise of key personnel?**

SFHSS Response:

No. For the purpose of the Minimum Qualification (MQ), the Respondent is defined as the bidding entity for this RFP, and a Proposal must meet each MQ prior to being reviewed by the evaluation panel.

- 26. Per RFP Section 3.5.9 (Section 9: Insurance), Please confirm that vendors must submit with their Proposal evidence that they carry the amount of insurance coverages stated in Article 5, Insurance and Indemnity, of the Professional Services Agreement (RFP Appendix A-1: Professional Services Agreement)**

SFHSS Response:

Yes. SFHSS will review all Proposals to ensure Respondents meet the Minimum Qualifications (RFP Section 3.2) and adhere to the Proposal Structure (RFP Section 3.5) prior to being reviewed by the evaluation panel.

27. What is the expected invoicing term?

SFHSS Response:

The selected Respondent shall provide an invoice to the City on a monthly basis for services provided during the prior month (see RFP Appendix A-1: Professional Services Agreement, Article 3.3, Compensation).

28. What is the current minimum wage in effect for the City and County of San Francisco? For contracts subject to the City’s Minimum Compensation Ordinance, what is the minimum compensation rate?

SFHSS Response:

Employers are required to pay no less than the San Francisco minimum wage to employees performing work in San Francisco.

See Minimum Wage Ordinance: <https://sf.gov/information/understanding-minimum-wage-ordinance>

Also, most City contractors and tenants (including at the Airport) must provide their covered employees³ with (a) no less than the MCO hourly wage in effect; (b) 12 paid days off per year (or cash equivalent); and (c) 10 days off per year without pay per year.

³See Pursuant to San Francisco Administrative Code, Section 12P.2. (Definitions):

(i) “Covered Employee” shall mean:

(1) An Employee of a Contractor who, during the applicable Pay Period, performs, during the Pay Period, any work funded (in whole or in part) under the applicable Contract or on the project funded under the applicable Contract:

- (A) Within the geographic boundaries of the City;
- (B) On real property owned or controlled by the City, but outside the geographic boundaries of the City; or
- (C) Elsewhere in the United States.